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Feature Article - A Statistical Overview of Tourism

INTRODUCTION

Tourism has a major impact on the Australian economy. It affects many sectors of the economy and contributes to employment, exports, consumption, gross value added and other services. In 2003–2004 tourism contributed 3.9% to gross domestic product (GDP). Tourism is also seen as providing a significant contribution to the economy of local regions within Australia.

The economic contribution of tourism in Australia is dominated by domestic not international visitors. Tourism is also an important contributor to Australia's export earnings.

This article demonstrates the range and useability of data available on the Tourism sector. It presents what tourism is, the significance of tourism to the Australian economy and how it has changed over time, the contribution made by international visitors compared to domestic visitors, and the concepts and collections that underpin tourism measurement.

DEFINING TOURISM

Tourism encompasses most short-term travel away from the normal place of work and residence. It is defined by the World Tourism Organization (WTO) as: "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited".

The WTO definition identifies "tourism" as more than just leisure travel. It encompasses travel for business, health, education, religious and other reasons. It includes both domestic and international travel and involves the consumption of a wide range of goods and services provided by, for example, transport and tour operators, accommodation establishments, theme parks and attractions, entertainment and arts venues, museums and historical sites, restaurants, travel agents and souvenir retailers.

The latest version of the **Framework for Australian Tourism Statistics** (cat. no. 9502.0.55.001) was released by the ABS in September 2003. It provides guidelines to encourage consistency and compatibility in the collection and analysis of tourism statistics in Australia.

The products that are produced and consumed in meeting tourism demand are not readily apparent since "tourism" is not regarded as a conventional industry or product in international and national statistical standards. To address this, the ABS first published **Australian National Accounts: Tourism Satellite Account, 1997–1998** (cat. no. 5249.0) in 2000. There are now seven years of data available.

WHAT IS THE TOURISM SATELLITE ACCOUNT?

The tourism satellite account provides a comprehensive set of economic data on the direct

contribution of tourism to the Australian economy within the national accounting framework. It provides a means by which the economic aspects of tourism can be drawn out and analysed separately within the structure of the main accounts and allows the determination of tourism's contribution to major national accounting aggregates.

The tourism satellite account uses a model to measure the magnitude of the tourism "industry" so it can be compared on a consistent basis with other industries in the economy. Key measures include tourism gross domestic product (GDP), tourism gross value added (GVA), tourism consumption by type of visitor, and tourism employment. The WTO identifies the tourism satellite account as the unifying framework of most of the components of the System of Tourism Statistics.

The tourism satellite account is compiled using a combination of visitors expenditure data from surveys conducted by the Tourism Research Australia (TRA), industry data from ABS collections, and supply-use relationships in the Australian System of National Accounts (ASNA) supply and use tables.

TOURISM'S SHARE OF GROSS DOMESTIC PRODUCT

Tourism GDP represents the total market value of Australian produced goods and services consumed by visitors after deducting the cost of goods and services used up in the process of production. Table 1 shows the tourism industry share of GDP for the seven years that the tourism satellite account has been compiled for.

TABLE 1. TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT (GDP)

| | 1997– 1998 | 1998– 1999 | 1999– 2000 | 2000– 2001 | 2001– 2002 | 2002– 2003 | 2003– 2004 |
|---|------------|------------|------------|------------|------------|------------|------------|
| Tourism gross value added at basic prices (\$m) | 21,894 | 23,054 | 23,994 | 25,044 | 25,250 | 25,939 | 26,016 |
| plus Net taxes on tourism products (\$m) | 3,048 | 3,213 | 3,321 | 5,817 | 5,637 | 6,041 | 5,935 |
| equals tourism GDP (\$m) | 24,942 | 26,267 | 27,316 | 30,861 | 30,887 | 31,980 | 31,952 |
| Gross domestic product (\$m) | 559,139 | 589,597 | 623,461 | 668,426 | 713,229 | 758,147 | 813,225 |
| Tourism share of gross value added (%) | 4.3 | 4.3 | 4.2 | 4.1 | 3.9 | 3.8 | 3.5 |
| Tourism share of gross domestic product (%) | 4.5 | 4.5 | 4.4 | 4.6 | 4.3 | 4.2 | 3.9 |

Source: Australian National Accounts: Tourism Satellite Account, cat. no. 5249.0.

Tourism accounted for nearly \$32 billion of the total GDP of \$813 billion in 2003–2004. This represents a 3.9% share of GDP and is the lowest share of GDP since the tourism satellite account was first compiled in 1997–1998. It is also the third consecutive decline since the share peaked in 2000–2001 as shown in graph 1.

The high tourism share of GDP in 2000–2001 was largely due to price increases in tourism services resulting from the

GRAPH 1. TOURISM SHARE OF GDP



Source: Australian National Accounts: Tourism Satellite Account, cat. no. 5249.0.

introduction of the Goods and Services Tax (GST) and the impact of the 2000 Olympic Games. During 2001–2002 and 2002–2003 external events such as the September 11 terrorist attacks and the Severe Acute Respiratory Syndrome (SARS) scare caused changes in both the level of international visitors to Australia and the willingness of Australians to travel overseas. The fall in the share of GDP in 2003–2004 occurred despite a surge in consumption by international visitors for the Rugby World Cup in late 2003.

INTERNATIONAL VERSUS DOMESTIC TOURISM

A key factor behind the fall in the tourism share of GDP in 2003–2004 was that Australians travelled less in Australia and more overseas compared with 2002–2003. This is shown by the decline in domestic tourism consumption in 2003–2004 and an increase in total outbound expenditure by Australians travelling overseas in 2003–2004.

In 2003–2004, domestic tourism contributed more than three-quarters (76%) of total tourism GDP, compared to a 24% contribution from international tourism as shown in table 2.

TABLE 2. TOURISM INDUSTRY GDP, BY TYPE OF VISITOR, \$m

| | 1997– 1998 | 1998– 1999 | 1999– 2000 | 2000– 2001 | 2001– 2002 | 2002– 2003 | 2003– 2004 |
|----------------------|------------|------------|------------|------------|------------|------------|------------|
| Domestic | | | | | | | |
| Households | 16,931 | 17,789 | 18,276 | 20,055 | 20,342 | 21,463 | 21,098 |
| Business/government | 2,702 | 2,877 | 2,972 | 3,331 | 3,162 | 3,251 | 3,215 |
| Total domestic | 19,632 | 20,666 | 21,248 | 23,387 | 23,504 | 24,714 | 24,313 |
| International | | | | | | | |
| International | 5,310 | 5,601 | 6,068 | 7,475 | 7,383 | 7,265 | 7,639 |
| Total | 24,942 | 26,267 | 27,316 | 30,861 | 30,887 | 31,980 | 31,952 |

Source: Australian National Accounts: Tourism Satellite Account, cat no. 5249.0.

TOURISM GVA

Tourism gross value added (GVA) is the value of output consumed by visitors minus the value of the inputs used in producing these tourism products. Table 3 shows that tourism contributed over \$26 billion to industry GVA in 2003–2004, an increase of over \$4 billion from the 1997–1998 level. In 2003–2004, the industries that accounted for the largest share of tourism gross value added were air and water transport (14%), accommodation (11%), cafes, restaurants and takeaway food outlets (10%), and other retail trade (9%). These shares have been reasonably steady since 1997–1998.

TABLE 3. TOURISM SHARE OF GROSS VALUE ADDED AND GROSS DOMESTIC PRODUCT

| | Units | 1997–1998 | 1998–1999 | 1999–2000 | 2000–2001 | 2001–2002 | 2002–2003 | 2003–2004 |
|---|-------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Tourism characteristic industries | | | | | | | | |
| GVA(a) | | | | | | | | |
| Travel agency and tour operator services | \$m | 835 | 869 | 895 | 992 | 966 | 975 | 962 |
| Taxi transport | \$m | 174 | 195 | 197 | 218 | 207 | 210 | 214 |
| Air and water transport | \$m | 3,211 | 3,309 | 3,430 | 3,727 | 3,592 | 3,557 | 3,521 |
| Motor vehicle hiring | \$m | 231 | 259 | 280 | 284 | 287 | 298 | 293 |
| Accommodation | \$m | 2,400 | 2,551 | 2,644 | 2,775 | 2,855 | 2,917 | 2,941 |
| Cafes, restaurants and food outlets | \$m | 2,209 | 2,362 | 2,454 | 2,501 | 2,601 | 2,689 | 2,599 |
| Total GVA of tourism characteristic industries(a) | \$m | 9,059 | 9,546 | 9,901 | 10,498 | 10,509 | 10,646 | 10,531 |
| GVA of tourism connected industries(b) | \$m | 10,268 | 10,795 | 11,139 | 11,572 | 11,769 | 12,152 | 12,360 |
| GVA of all other industries(c) | \$m | 2,567 | 2,714 | 2,955 | 2,974 | 2,973 | 3,140 | 3,125 |
| Tourism GVA | \$m | 21,894 | 23,054 | 23,994 | 25,044 | 25,250 | 25,939 | 26,016 |
| Tourism share of GVA | % | 4.3 | 4.3 | 4.2 | 4.1 | 3.9 | 3.8 | 3.5 |
| Net taxes on tourism products | \$m | 3,048 | 3,213 | 3,321 | 5,817 | 5,637 | 6,041 | 5,935 |
| Tourism GDP | \$m | 24,942 | 26,267 | 27,316 | 30,861 | 30,887 | 31,980 | 31,952 |
| Tourism share of GDP | % | 4.5 | 4.5 | 4.4 | 4.6 | 4.3 | 4.2 | 3.9 |

(a) Tourism characteristic industries have at least 25% of their output consumed by visitors.

(b) Tourism connected industries are those industries not classified as characteristic that have products which are consumed by visitors in volumes which are significant.

(c) The share of GVA of all industries that provide outputs to visitors not included in characteristic or connected industries.

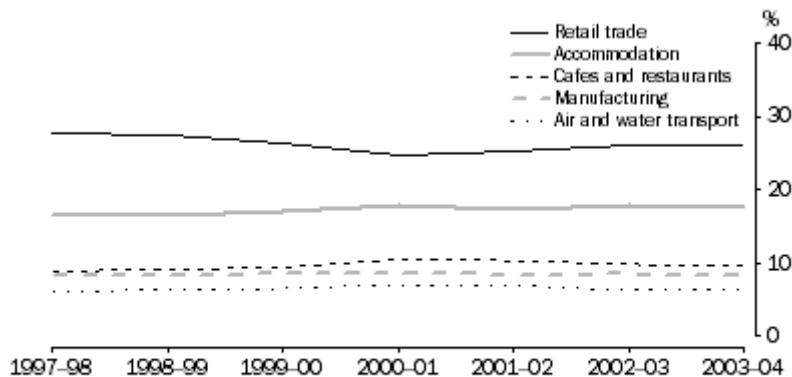
Source: Australian National Accounts: Tourism Satellite Account, cat. no. 5249.0.

TOURISM EMPLOYMENT

The tourism industry employed 536,600 persons in 2003–2004. Tourism employment grew 5.5% between 1997–1998 and 2003–2004, slower than the growth in total employed persons (11.1%) over that period. Consequently, the tourism share of total employed persons fell from 5.9% in 1997–1998 to 5.6% in 2003–2004.

The tourism share of total employment is higher than the tourism share of industry GVA. This is because tourism tends to be generally more labour intensive than other forms of economic activity.

GRAPH 2. PEOPLE EMPLOYED IN TOURISM, By selected industries(a)



(a) As a percentage of total tourism employed persons.

Source: Australian National Accounts: Tourism Satellite Account, cat. no. 5249.0.

The Retail trade industry generated the most tourism employment (26% of total tourism employment). The retail trade, accommodation, and the cafes and restaurants industries account for more than half of the employment generated by tourism. These shares have been reasonably steady since 1997–1998 as shown in graph 2.

EXPORTS OF TOURISM GOODS AND SERVICES

Tourism makes an important contribution to Australia's export earnings. In 2003–2004, international visitors consumed \$17.3 billion worth of goods and services produced by the Australian economy as shown in table 4. This represented a 12.1% share by Tourism of the total exports of goods and services, which means that tourism is now more significant than many of our more traditional exports such as coal, wheat, wool, iron and steel which have sustained our economy in the past.

While tourism exports grew quite strongly between 1997–1998 and 2000–2001, so did exports of other goods and services. However, in 2003–2004 tourism exports increased by 4%, while total exports declined by 3% thus leading to an increase in the tourism share.

The decrease in total exports in 2001–2002 and 2002–2003 were mainly the result of the decrease in short-term arrivals of international visitors to Australia.

TABLE 4. EXPORTS OF TOURISM GOODS AND SERVICES

| | 1997–1998 | 1998–1999 | 1999–2000 | 2000–2001 | 2001–2002 | 2002–2003 | 2003–2004 |
|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| International visitor consumption (\$m) | 12,792 | 13,445 | 14,610 | 17,140 | 17,107 | 16,656 | 17,317 |
| Total exports (\$m) | 113,744 | 112,025 | 126,222 | 153,763 | 153,200 | 148,293 | 143,366 |
| Tourism share of exports (%) | 11.2 | 12.0 | 11.6 | 11.1 | 11.2 | 11.2 | 12.1 |
| Growth in international visitor consumption (%) | .. | 5.1 | 8.7 | 17.3 | -0.2 | -2.6 | 4.0 |
| Growth in total exports (%) | .. | -1.5 | 12.7 | 21.8 | -0.4 | -3.2 | -3.3 |

.. not applicable

Source: Australian National Accounts: Tourism Satellite Account, cat. no. 5249.0.

SHORT-TERM INTERNATIONAL VISITOR MOVEMENTS

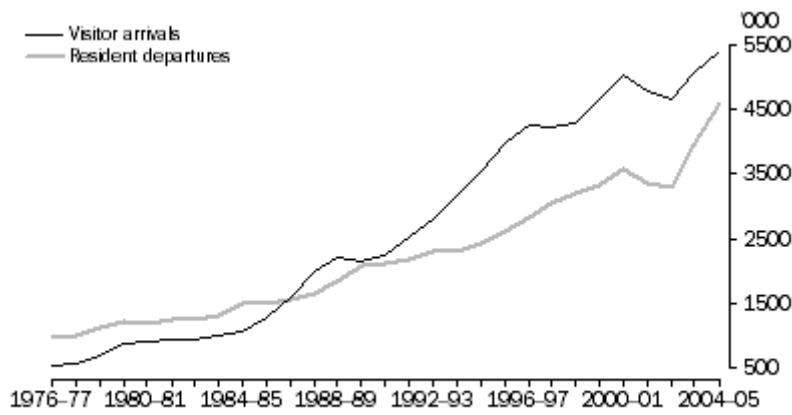
Statistics on international short-term visitor arrivals and short-term resident departures relate to the number of movements of travellers rather than the number of travellers (i.e. the multiple movements of individual persons during a given reference period are all counted). Available time series data starting from the mid-1970s allows analysis of a longer series for short-term visitor arrivals and resident departures than for the Tourism Satellite Account.

For the past 25 years, short-term visitor arrivals and resident departures have generally increased year by year as shown in graph 3. Prior to the mid-1980s, Australian resident departures were higher than international visitor arrivals. However, since 1986-87, there have been more visitor arrivals than resident departures.

Graph 3 shows that in 2004-2005, there were 10 times as many short-term visitor arrivals to Australia (over 5.4 million) as there were in 1976-77 (540,400). The 2004–2005 figure was the highest number of arrivals ever recorded, and the second consecutive increase since the dip in 2001–2002 and 2002–2003.

Similarly, short-term departures of Australian residents increased nearly five-fold over the past 25 years. There were 4.6 million short-term resident departures in 2004–2005 compared to 965,600 in 1976-77. This was the highest number of short-term resident departures ever recorded for a financial year. In general, there was a strong upward trend in short-term resident departures, despite the decreases experienced in 2001–2002 and 2002–2003.

GRAPH 3. SHORT-TERM INTERNATIONAL VISITOR ARRIVALS AND RESIDENT DEPARTURES



Source: Overseas Arrivals and Departures, Australia, cat. no. 3401.0.

In 2004–2005, the top source countries for short-term visitor arrivals were New Zealand (20% of total visitor arrivals), Japan and the United Kingdom (each 13%), the United States of America (8%), Singapore and China (each 5%). Most travellers from these countries stated holiday or visiting friends and relatives as the main reason for their journey.

Korea, Malaysia, Hong Kong and Germany were also among the major source countries of short-term visitor arrivals.

The top destinations for Australian resident departures in 2004–2005 were New Zealand (18% of total), the United States of America (9%), the United Kingdom (8%), Indonesia (7%), and China (5%). Most travellers to these countries stated holiday as the main reason for their journey. Other popular reasons for travel included visiting friends and relatives and for business purposes.

Other major destinations for short-term resident departures included Fiji, Thailand, Singapore,

Hong Kong, Malaysia, Viet Nam and Japan. Short-term departures to these countries have steadily climbed in the last 25 years, reaching more than 1 million combined in 2004-2005 (24% of all short-term departures).

FACTORS AFFECTING SHORT-TERM INTERNATIONAL MOVEMENTS

A wide range of world events appeared to influence short-term travel patterns. These included economic and safety concerns, as well as world sporting and cultural events which either deterred or attracted people to visit specific destinations.

Significant events that contributed to increases in the number of short-term visitor arrivals to Australia were recorded in;

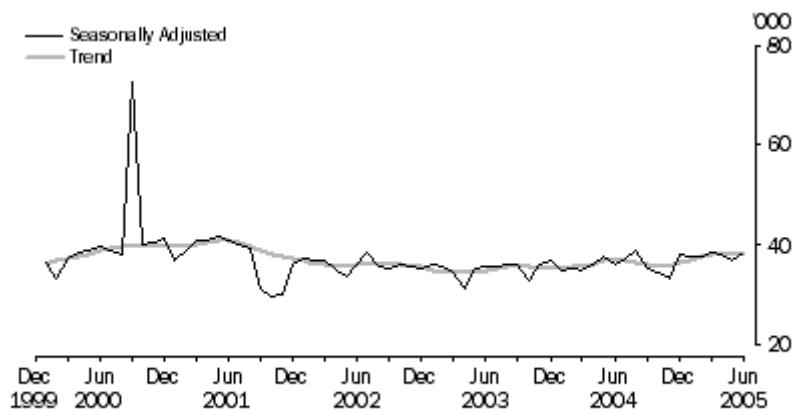
- 1981–1982 (Brisbane Commonwealth Games — Sept/Oct 1982),
- 1987–1988 (Brisbane World Exposition),
- 2000–2001 (Olympic games — September 2000) and
- 2003–2004 (the Rugby World Cup 2003).

Conversely, events that contributed to decreases in short-term visitor arrivals include the Australian airlines pilots' dispute in 1989, the Asian financial crisis in 1998, the collapse of Ansett in 2001 and the September 11 2001 terrorist attacks in the USA.

The influences of significant events can best be demonstrated by showing seasonally adjusted and trend estimates. Seasonally adjusted estimates allow analysis of short-term movements including irregular impacts on the series, while trend estimates provide a better method to analyse and monitor the underlying direction of the short-term movement series. In most cases, the trend series is the best source of information on the long-term direction of these statistics.

Graphs 4 and 5 show examples of short-term visitor arrivals from specific countries on a monthly basis. The graph for the United States of America shows a peak in short-term arrivals that corresponds to the Sydney Olympic and Paralympic Games in September 2000, and a decline following the September 11 attacks in 2001 (graph 4). Similarly, the graph for Japan shows a decline in short-term visitor arrivals from that country following the September 11 attacks in 2001, and a strong decline in 2003 following the outbreak of SARS in some Asian countries (graph 5). This may reflect the fact that a number of countries affected by SARS are transit points for international travel, such as travel between Japan and Australia.

GRAPH 4. INTERNATIONAL SHORT-TERM VISITOR ARRIVALS TO AUSTRALIA: United States of America



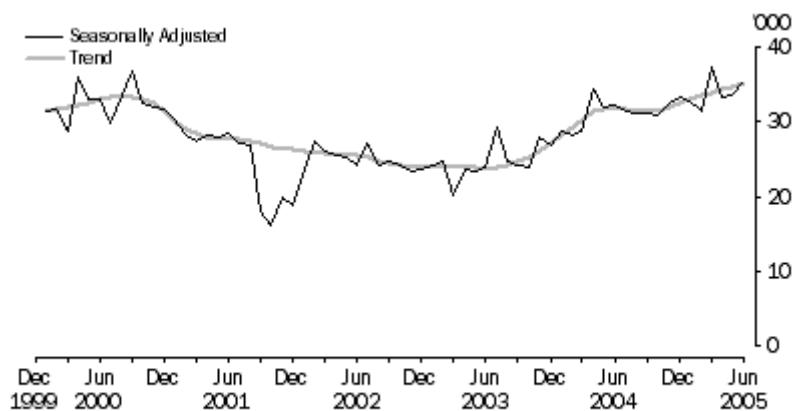
GRAPH 5. INTERNATIONAL SHORT-TERM VISITOR ARRIVALS TO AUSTRALIA: Japan



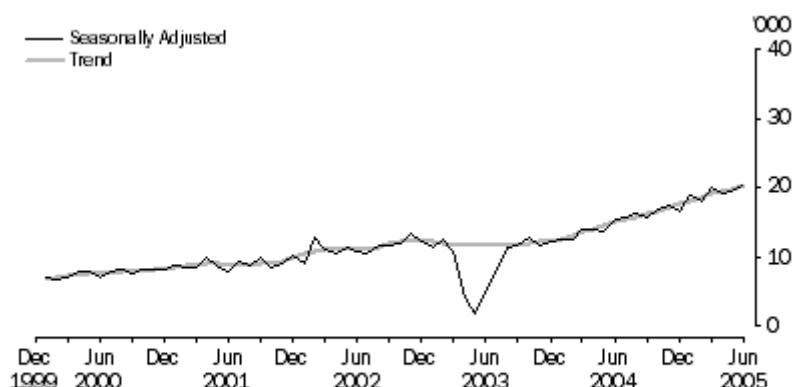
Many of the events that influence short-term visitor arrivals also influence short-term resident departures. The graphs below, using monthly seasonally adjusted and trend estimates, demonstrate the impact of significant events on short-term resident departures to specific countries.

Graph 6 shows that following the September 11 terrorist attacks in 2001, short-term resident departures to the United States of America showed significant decreases for several months following that event. The graph for China shows the impact of the SARS scare on departures to that country in the early part of 2003 (graph 7).

GRAPH 6. AUSTRALIAN SHORT-TERM DEPARTURES: United States of America



GRAPH 7. AUSTRALIAN SHORT-TERM DEPARTURES: China



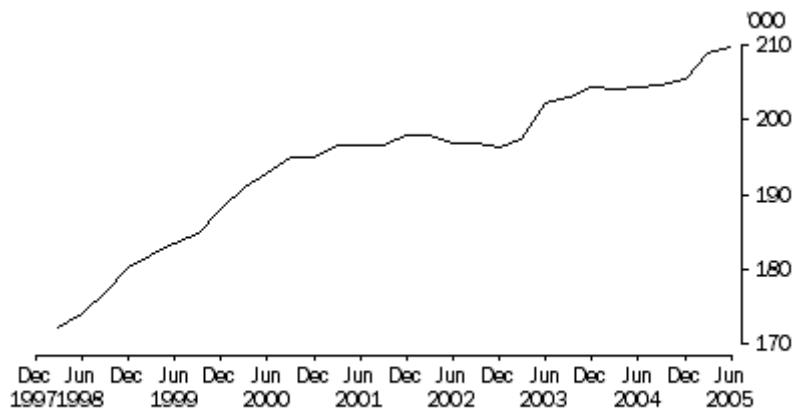
Source: ABS Overseas Arrivals and Departures, Australia, cat. no. 3401.0.

TOURIST ACCOMMODATION CAPACITY

Capacity in terms of rooms/units/apartments/suites is the maximum number available to accommodate paying guests on the last day of the survey period. Capacity closed temporarily for seasonal reasons is included.

Graph 8 shows that the total recorded capacity for hotels, motels and serviced apartments with 15 or more rooms has generally increased since 1997 when consistent time series data became available. Capacity reached 209,823 rooms in the June quarter 2005 (up 2.6% from the June quarter of 2004). The number of establishments for hotels, motels, guest houses and serviced apartments with 15 or more rooms also generally increased.

GRAPH 8. HOTELS, MOTELS AND SERVICED APARTMENTS, Capacity—Australia



Source: Tourist Accommodation, Australia, cat. no. 8635.0.

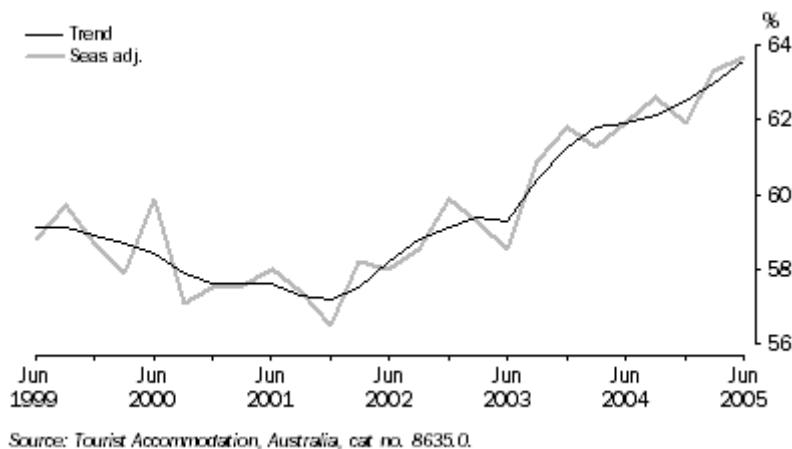
ROOM OCCUPANCY RATES

The room occupancy rate represents room occupancy expressed as a percentage of total capacity available during the survey period, which include the operating periods of establishments closed for seasonal reasons.

The trend estimate of the room occupancy rate for hotels, motels and serviced apartments with 15 or more rooms rose by 1.7 percentage points from 61.9% in the June quarter 2004 to 63.6% in the June quarter 2005. Apart from a minor fall in September quarter 2003, This rate has been

increasing since the December quarter 2001 (graph 9).

GRAPH 9. ROOM OCCUPANCY RATE, Seasonally adjusted and Trend—Australia



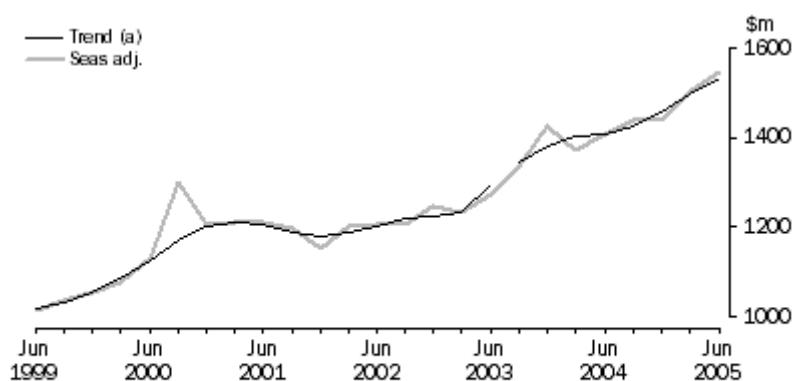
Source: Tourist Accommodation, Australia, cat no. 8635.0.

The seasonally adjusted estimate of the room occupancy rate increased by 1.8 percentage points to 63.7% from June quarter 2004 to June quarter 2005.

ACCOMMODATION TAKINGS

The total accommodation takings for hotels, motels and serviced apartments with 15 or more rooms combined continued to increase, reflecting the combined effect of increased demand for higher quality accommodation, higher tariffs (including the effects of inflation) and an increase in the average number of guests per room (graph 10). In June quarter 2005 the trend estimate of the total accommodation takings rose by 8.9% from the June quarter 2004 to \$1,535.2 million. The seasonally adjusted estimate of the total accommodation takings rose by 9.8% from the June quarter 2004 to \$1,545.0 million in the June quarter 2005.

GRAPH 10. ACCOMMODATION TAKINGS(a), Seasonally adjusted and Trend—Australia



(a) Break in time series between the March and June quarters 2003.

Source: Tourist Accommodation, Australia, cat. no. 8635.0.

CONCLUSION

Tourism constitutes an important contribution to the economy, providing 4% of GDP in 2003–2004. Tourism's GVA of \$26 billion in 2003–2004 was higher than the GVA of the agricultural industry. The bulk of total tourism GDP is contributed by domestic tourism (76% in 2003–2004). The tourism industry employed 536,600 persons in 2003–2004, with the retail trade industry generating the most tourism employment. Tourism represents about 12% of Australia's exports of goods and services. Tourist accommodation, capacity and room occupancy rates have generally

increased since the late 1990s.

These and other tourism indicators affirm the importance of tourism in the economy.

Short-term international visitor movements to and from Australia have shown a dramatic increase over the last 25 years. Changes in short-term travel patterns of visitors arriving in Australia and of residents departing to other countries were influenced by world events such as sporting and cultural events, industrial disputes, war and safety concerns, acts of terrorism, health scares, and natural disasters.

Australia produces tourism statistics that meet the broad needs of users. These statistics are generally collected and analysed based on the Framework for Australian Tourism Statistics. The framework incorporates Australian and international statistical standards, thus promoting compatibility and comparability from all tourism statistical collections.

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APPENDIX

CONCEPTS AND COLLECTIONS USED TO MEASURE TOURISM

The latest version of the **Framework for Australian Tourism Statistics** (cat. no. 9502.0.55.001) was released by the ABS in September 2003. The Framework aims to provide guidelines which will encourage consistency and compatibility in the collection and analysis of tourism statistics in Australia. It is intended to apply not only to ABS collections but all collectors and users of tourism statistics from government agencies and the private sector.

The Framework for Australian Tourism Statistics incorporates Australian and international statistical standards. It is in line with international tourism concepts and definitions developed by the World Tourism Organization (WTO). It also reflects Australian tourism statistical standards developed by the Tourism Research Australia (TRA) in 1996 and 1997.

The April 2005 issue of **Tourism Satellite Account, Australian National Accounts** (cat. no. 5249.0) contains detailed results of the latest (2003–2004) Tourism satellite account.

Statistics of international arrivals and departures measure the number and characteristics of Australian residents departing from and international visitors arriving in Australia. The data items include:

- country of last residence or stay;
- country of birth;
- nationality;
- purpose of journey;
- duration of stay;
- State of longest period of stay;
- age, sex, marital status; and
- country of embarkation and port of clearance.
- Other items are available on request.

Tourist Accommodation, Australia (cat. no. 8635.0) provides information on the supply of, and demand for, tourist accommodation facilities. Data include number of establishments, capacity and employment for the quarter and occupancy and takings from accommodation for each month.

Statistics on tourist accommodation are obtained from the quarterly Survey of Tourist Accommodation (STA). From the March quarter 2005 the scope of the STA has been expanded to include data for hotels, motels and serviced apartments with 5 or more rooms or units; holiday flats, units and houses of letting entities with 15 or more rooms or units; caravan parks with 40 or more powered sites and visitor hostels with 25 or more bed spaces.

From 1998 to 2004 the survey included hotels, motels and serviced apartments with 15 or more rooms on a quarterly basis. For the years 2000 and 2003 only, the collection also included holiday flats, units and houses of letting entities with 15 or more rooms or units; caravan parks with 40 or more powered sites and visitor hostels with 25 or more bed spaces.

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